

Action Items

**RACINE UNIFIED SCHOOL DISTRICT
BOARD OF EDUCATION
March 16, 2015
Communications & Community Engagement**

- AGENDA ITEM:** Communicating and Engaging Our Community–Thoughtexchange Proposal
- PRESENTING:** Dr. Haws, Stacy Tapp
- DESCRIPTION:** The Racine Unified School District and Board of Education’s role as a public entity requires that we seek input from our community to understand their priorities and make decisions based on their input. The RUSD proposes entering into a 5-year partnership with Thoughtexchange to develop a local, district-specific open-ended community engagement process to seek public input, ask important questions, and fully understand our community’s priorities for RUSD. Results from the Thoughtexchange process will inform the Board and administration in decision-making about district priorities, especially those related to the referendum’s facility and technology planning processes.
- Thoughtexchange would implement a total of ten online ‘community engagement sessions’ over the next five years. Each ‘engagement session’ will take 4-8 months to complete a full cycle of input gathering, analysis and reporting for the Board and RUSD administration. All results will be shared with the entire community and all participants. Thoughtexchange will work closely with RUSD to develop pertinent open-ended questions, gather community online input, and manage all of the logistics of reviewing, organizing and summarizing participants’ input.
- As a result of the partnership with Thoughtexchange, over the next five years, RUSD will have clear direction from the community. Understanding the community’s priorities, opinions and values will assist the Facilities and Technology Advisory Councils, RUSD administration and the Board of Education in decision-making that reflects the wishes of our constituents.
- FISCAL NOTE:** A five-year agreement with Thoughtexchange, including 10 facilitated community engagements will cost \$228,000 (if paid in full) or \$240,000 if paid in installments.
- RECOMMENDATION:** Approve a five-year agreement with Thoughtexchange for 10 facilitated community engagements over that time period for a total cost not to exceed \$240,000.

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Background

The Racine Unified School District of Wisconsin supports more than 20,000 students through 45 schools. Ensuring students are educated to succeed is first amongst the District's mission and vision statements.

In an effort to build community relationships and enhance the quality of dialogue, the district is exploring ideas on how to engage families and community members to ensure they understand and are able to comment on decisions that will affect student outcomes.

A key need in the immediate future is to build trust, confidence and knowledge across the district by demonstrating a thorough process of consideration to inform district leadership planning and decisions. It is also important to ensure the alignment of strategic direction and fiscal responsibility with facilities, resources and district needs specifically as they relate to referendum funds. Facilities modernization, construction of new facilities and technology are key focus areas with regard to referendum funding for the next three years.

Alignment with community priorities and an established community trust in District leadership is important at all times, and will be critical when the time comes to ask for the community's support for any future planning. The District hopes to be able to strengthen these key pieces concurrently with its planning process.

About Thoughtexchange

Thoughtexchange combines a software-driven online process with facilitation services in an unprecedented way to engage stakeholders in a meaningful dialogue, which over time creates trust in the District. We do this by accomplishing some difficult but critical tasks:

- We balance open-ended questions with the promise that "every thought will be considered." We manage the logistical challenges of engaging hundreds of participants and the resulting thousands of thoughts in a streamlined process.
- We create a forum where thoughts can be freely expressed without modification or censorship. We protect everyone participating. Through confidentiality and moderation, we are able to keep the interactions civil and on point.
- Our patent-pending process has each participant consider his or her own thought along with others' and indicate which are the most valuable, which enables the community's real priorities, and not the most common or most loudly expressed opinions, to rise to the surface.
- We match hands-on service with the thoughtful design and reach of our online process to accomplish our shared goals without demanding a large time commitment from either the District or from the community participants.

Thoughtexchange processes consistently yield high participation rates, effectively tap into group learning at a large scale and cumulatively work to build trust in the District.

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“We’re proud of our past efforts but nothing has even come close to Thoughtexchange.”

Ben Small, Superintendent, Central Valley School District

Goals

We see three potential goals that can we achieve by working together with the District.

1. Dramatically increase the number of constituents within and across the District meaningfully contributing their ideas and priorities to critical facilities issues facing the District, and learning from other constituents by connecting with as many people as possible who can not, or will not, attend face-to-face planning meetings.
2. Improve the District’s ability to learn from and take action on community engagement efforts by ensuring diverse constituent opinions are considered and results are well understood by leadership and by other constituents. Enable to the District to definitively demonstrate through each process that it has listened to and has learned from the community’s input.
3. Build community trust in the administration over the course of several engagement processes defined by accessibility, transparency, civility and collaborative learning.

Proposed Approach to Stakeholder Engagement

At a Glance:

	Type	Timeline	Objective
Phase 1	Weather report	Feb – April 2015	Start the dialogue. Identify issues and priorities. Establish commitment to learning.
Phase 2	Scenario based	Sep – Nov 2015	Showing the learning from the previous phase, identify concerns, hopes and priorities around 2 facilities scenarios related to the district’s facilities planning of new schools.
Phase 3	Weather report	Jan – Mar 2016	Gauge learning and trust, revisit issues and priorities. Showed continued commitment to learning.
Phase 4	Issue based	Sep – Nov 2016	Showing the learning from all earlier phases, identify concerns, hopes and priorities around an issue identified through earlier processes.
Phase 5	Weather report	Jan – Mar 2017	Gauge and compare from earlier phases the learning and trust, revisit issues and priorities. Showed continued commitment to learning.
Phase 6	TBD	Sep – Dec 2017	Continue to address and engage constituents to resolve critical District issues. Strengthen culture of trust.
Phase 7	TBD	Spring	
Phase 8	TBD	Fall	
Phase 9	TBD	Spring	
Phase 10	TBD	Fall	

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5 Year - Proposed Approach to Online Stakeholder Engagement

Thoughtexchange proposes a multi-phase approach to uncover the needs and priorities related to District planning initiatives and critical decision-making processes. This approach has two District-wide engagements to be completed annually. Each phase builds cumulatively on the preceding processes to educate and engage the community and build trust in the administration.

The Phases would be revisited regularly and revised to take into account changes in the District's priorities for the remainder of the engagement period.

Phase 1 –District “Weather Report”

Duration: February – April 2015

Complete an initial system-wide consultation to engage parents, community members, staff, senior administration and board members in a dialogue about education (concerns and strengths) at the individual school and District levels. This will demonstrate the District's commitment to listening and learning and will begin to align community needs and priorities with District planning efforts.

Phase 2 – Scenario Development

Duration: September – November 2015

Based on findings of District staff, planning committee members and prior stakeholder input, two scenarios to specifically address facilities planning options will be put together for comment. These scenarios will be created to ensure constituents can best understand the needs of the District and the opinions of one another.

Phase 3 – 2nd Annual Current State / District “Weather Report”

Duration: January – March 2016

This phase will allow constituents to comment on the current state of the District and will critically allow for a comparison to the results of the initial “weather report” consultation. It will allow the District to gauge learning and trust, to revisit issues and priorities and will show continued commitment to listening and learning.

Phase 4 – Critical Issue Discussion

Duration: September - November 2016

This phase will be based on another critical issue, possibly distilled from the earlier engagements. It will serve to build further trust and demonstrate to the community members how the community's input is being acknowledged and influencing the process irrespective of the District's imminent need for community project funding.

This engagement will further build buy-in and capacity for additional District planning initiatives.

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Phase 5 – 3rd Annual Current State / District “Weather Report”

Duration: January – March 2017

Complete a third system-wide consultation updating and surfacing stakeholder priorities (concerns, strengths and areas to build upon) relating to the direction of education at the individual school and District level. This phase will allow for an in-depth multi-year engagement comparison, across years 2014-15, 2015-16, and 2016-17

Phase 6 – TBD based on District needs.

Phase 7 – TBD based on District needs.

Phase 8 – TBD based on District needs.

Phase 9 – TBD based on District needs.

Phase 10 – TBD based on District needs.

Thoughtexchange Process Overview

Throughout the length of your contract your District will be supported by:

- 1 – A Team Lead Facilitator
- 2 – Facilitation/Moderation and Support Team
- 3 – Data Analysis and Visualization team
- 4 – Website Development Team
- 5 – Account Executive

Each Phase Contains the Following Stages:

Planning

Thoughtexchange will work with District staff to establish language around the impact the engagement process will have. We will work with you to identify key outcomes, rationale, public messaging and engagement questions that drill down to address key issues. We will help you create a plan to target specific stakeholders and to distribute invitations through email, advertising, newsletters and websites. This process is designed and implemented to ensure minimal impact on the workload on your District staff. A Thoughtexchange engagement can be segmented into the following stakeholder groups:

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Individual School Thoughtexchange Process - This includes parents and educational staff. It will allow you to understand the challenges and benefits at a grassroots level.

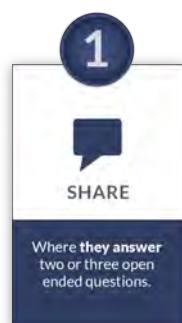
District Thoughtexchange Process - This includes senior administrators, board members, non-educational District members, etc. A demographic question is used to group the different stakeholders and provide you with results for each demographic.

Community Thoughtexchange Process – This is a self-register process sent out to community members who do not have students in school. Participation will be encouraged via newspaper, District website, word of mouth, etc.

Participation

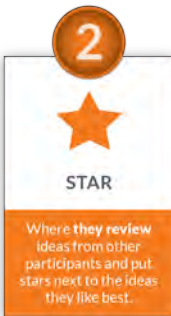
We will involve stakeholders in an iterative learning process that involves 3 steps: Share, Star and Discover.

The entire 3-step process is inclusive, fair and informative and we expect to generate for the District thousands of thoughts and tens of thousands of stars assigned to priorities. We facilitate the process while avoiding the organizational and political challenges often associated with social media and online forums. Each process will be hosted on Thoughtexchange servers and facilitated by Thoughtexchange staff. This will be done in alignment with your staff to ensure participants are encouraged to contribute locally.

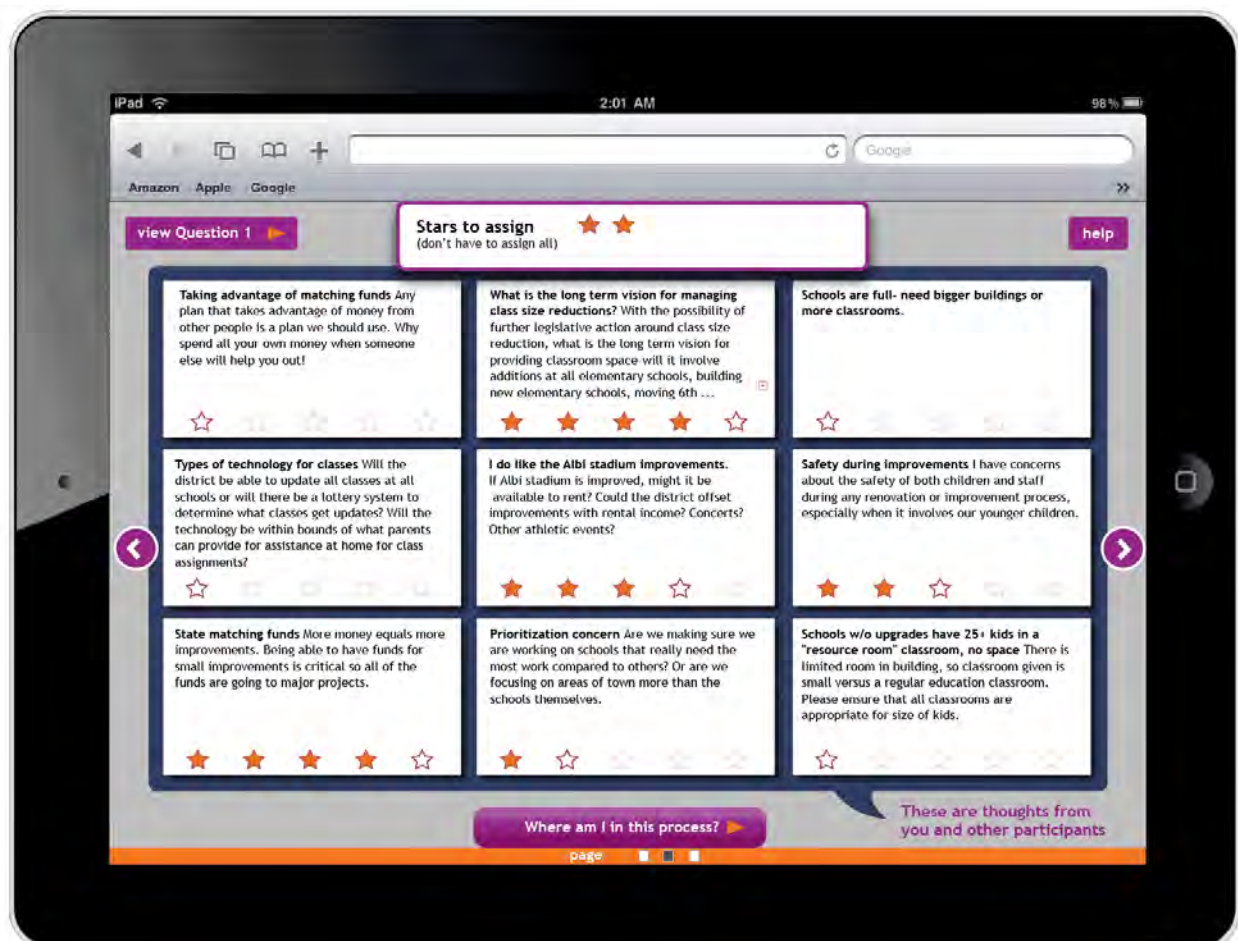


In the Share step, participants are asked two or three open-ended questions, such as “what do you appreciate?” and “what are your concerns?” either generally or about a particular issue or scenario. This process takes a participant about 10-15 minutes. A participant can provide more than one thought in response to each question. With Thoughtexchange, a few questions will generate thousands of thoughts and dozens of themes.

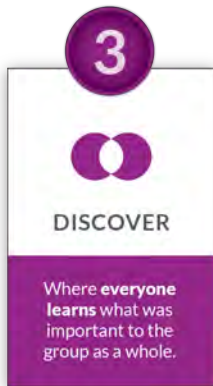
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In the Star step, participants are shown their own thoughts surrounded by the thoughts of other stakeholders and are asked to assign stars in order to show which thoughts they value, and how much value they place on those thoughts. This process also takes about 10-15 minutes. By considering the perspectives of a diverse range of stakeholders, participants learn from each other and potentially will shift priorities. This process allows the most valuable thoughts, and not the most common thoughts, to surface. This is how we accomplish group learning.



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In the Discover step, participants are invited to view an interactive report on the District-wide earning that resulted from the process. The custom website is build by us for the District and (and is included in base price of our engagement). Each report allows each participant to drill down into themes to the level of thoughts to see which thoughts were most valued by the community as a whole. Other examples of sharing tools are reports and videos.

The Discovery step is especially important in building trust with all stakeholders through the transparent sharing of appropriate results.

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Advanced Data Analysis and Visualization for the District leadership

The Discovery step contains powerful information for the District, surfacing concerns and priorities and, just as importantly, enabling the District to speak to community concerns using the language of the community. In addition to the interactive reports we will consolidate the results from participants, organize and analyze findings and present custom reports to District and local school leadership.

This data can be re-purposed and built into a variety of reports to inform multiple levels of District / School level planning and decision-making.

Software Licensing

We manage and host your initial stakeholder engagement processes as a turnkey solution. This minimizes the impact on the District's IT infrastructure and personnel. Having said that, included in your contract is a license to our software, along with comprehensive support, which will, if you choose, allow the District personnel to directly manage the later scheduled engagement processes. Effective stakeholder consultation with Thoughtexchange is cost-

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effective and becomes more efficient as staff members become proficient with our user-friendly tools and methodology.

Staff members wishing to learn how to use Thoughtexchange can take a coaching program. The District will have Thoughtexchange as an established engagement system, allowing additional future initiatives.

Ongoing Service and Support

As needs arise we can provide you with ongoing support and service. Comprehensive facilitation, basic phone and email support is included with your licensing and additional custom facilitation and professional services can be contracted separately in the future to address specific challenges if required.

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The Thoughtexchange Difference

No logins/passwords – Our unique email-based participation technology ensures fair and inclusive participation and does not bias toward people most comfortable with social networking and technology.

Convenient participation – Unlike town-hall meetings our simple online process results in unprecedented numbers of participants including the “silent majority” who contribute ideas and priorities at a time that is convenient for them.

Actionable information – Rather than just showing you are “listening” to stakeholders via social media/survey tools, Thoughtexchange produces qualitative data organized and prioritized by many stakeholders. Each process results in a platform for learning, decision-making, positioning and project implementation. Appropriate results are shared with the entire community and in depth analysis is provided to decision leaders.

Full service – Thoughtexchange blends powerful software with a full service approach that includes project management, communications support, facilitation, moderation, graphic design, website creation, analysis, meeting facilitation, engagement consulting and more.

Capacity development - This process and powerful software will allow your leaders to earn buy-in and inform decisions on a more regular basis which will enhance the overall performance of your District and increase stakeholder trust.

“Thoughtexchange affirmed for us that people truly want to be engaged, but didn’t always have the right tools to become engaged before.”

Kevin Morrison, Director of Community Relations, Spokane Public Schools.

Price Quote



Racine Unified School District

February 10, 2015

To: Lolli Haws

5 Year Thoughtexchange System with 10 Facilitated Engagements

Item	List	Price*
Software yearly license includes: <ul style="list-style-type: none">• Unlimited participants and facilitators• Unlimited phone and email based support• Custom branding	\$200,000	\$130,000
10 Parent & Staff District Wide Engagement Processes**	\$200,000	\$110,000
Up to 30 Hours Engagement Consulting	\$3,000	\$0
Total	\$403,000	\$240,000

*Subscription agreement must be accepted by 25-Feb-15 for this pricing

** All District Wide Engagement Processes include:

- Custom landing pages and self-register links
- Custom analysis and results web site

A 5% Discount is available if the full amount is invoiced immediately: \$228,000

Or you will be invoiced yearly on the anniversary of your agreement:

March 1st 2015	\$98,000
July 1st 2015	\$98,000
July 1st 2016	\$32,000

Thoughtexchange, Fulcrum Management Solutions Inc.
Suite 414, 9116 E Sprague Ave., Spokane Valley, WA 99206

Neil Schuler, Senior Account Executive
800.361.9027 x 231 | 604-836-3804
neil.schuler@thoughtexchange.com